Enterprise Project Management Office

Improvement Plan for Fiscal Year 08-09

Our Primary Mission

To provide leadership for the improvement and expansion of Project Management across state government through coordination and communication, standardization and measurement, and mentoring and coaching.

To improve the management of IT investments over their life cycle by providing expert advice, formal education and training, extensive documentation and personal instruction on the underlying theories and concepts of portfolio management. Training in the use of the supporting software tool is a key component of this mission.

Our Legislative Responsibility

The Enterprise Project Management Office (EPMO) was established in 2004 to assist the State CIO (SCIO) in his legislated responsibility to improve the management of IT projects in state government. The EPMO is one component of this legislation; NC General Statutes - Chapter 147 Article 3D.

The State CIO has legislative oversight authority to review and approve State agency IT projects; develop standards and accountability measures for IT projects (including criteria for adequate project management); to require status reporting; to assign a project management advisor (PMA); and, if necessary, to suspend projects. The purpose of this legislation is to help to ensure that quality IT projects are delivered in a cost effective and timely manner.

By law, agencies must provide for a project manager who meets the applicable quality assurance standards for each IT project. The agency project manager is responsible for managing the project and providing periodic reports which shall include information regarding projects costs; issues related to hardware, software or training; projected and actual completion dates and any other information related to the implementation of the IT project.

Our Vision

The EPMO provides professional oversight to facilitate successful IT projects through assessing projects and facilitating resolution of issues, risks and roadblocks and by providing early warnings if a project is likely to fail. The EPMO does this through applying professional experience and best practices and by providing full and complete information to the SCIO to ensure the SCIO can respond appropriately.

We also engage agencies in understanding and applying IT portfolio management concepts to IT projects, applications and IT investments (plans and budgets). This is done through IT Portfolio Management services, which provides financial, technical, and management personnel with a knowledge and understanding of the theories, concepts, and disciplines of portfolio management. The service also includes training and support

for the use of the Portfolio Management software tool to improve the planning, budgeting, and management of IT, especially IT investments.

Our Strategy - Improvement Areas in the Year Ahead

The EPMO plans to make progress in the following areas as part of its commitment to continuous improvement and in response to results from the 2007 customer satisfaction survey:

1. Improve communication to our customers

2. Improve project management knowledge sharing

3. Coordinate training to improve and grow project manager skills

4. Implement two EPMO processes that provide value to agencies

5. Review tools and processes to help improve project quality and reduce project risk

6. Develop and improve metrics that effectively measure project success and EPMO effectiveness

7. Coordinate the effort to improve and align project approval and procurement processes

1. Improve Communication to Our Customers

Overview	Ensure awareness and consistent understanding of the project approval legislation, processes, guidelines, tool and EPMO services through effective communication.
Benefits	• Better understanding of the value of the EPMO. • Consistent and timely information sharing. • Improved project information submittal so agencies spend more of t heir time on managing projects instead of reporting information.

08-09 Action Plan	
Develop an EPMO Communication Plan. (Shaw, Gaye, Linda)	Identify all forms of communications, determine best method of communication including who, what, when and how.
Enhance the EPMO web site. (Jesus, Barbara)	Improve content and organization.
Review the EPMO mission statement to clearly articulate the value of the oversight of IT projects. (EPMO Team)	Revisit the mission statement based on the EPMO progression in maturity from original office creation in 2004.
Communicate the value of the relationship between state approvers, PMA, QA and agency PM.(EPMO Team)	Communicate roles and responsibilities, enable communication to expedite problem resolution and provide consistent and clear direction on processes while ensuring project success.
Continue Project Management Advisory Group (PMAG) and Methodology Group meetings. (Bob and Alisa)	PMAG interacts with the Enterprise PM community to share project experiences, discuss process changes, solicit ideas, present training opportunities, highlight key roles, bring in speakers on topics of interest.
Survey agencies on EPMO services. (Gaye)	Resurvey user community in June 2009 using June 2007 survey as a baseline for improvement.

07-08 Accomplishments	
Completed agency survey on EPMO services.	Survey done Fall of 2007, 37 surveys received, 16 agencies responded.
Enhanced and expanded training for the PPM tool.	Provided new user training to 150 customers. Created a video presentation for new user training.
Clarify status reporting requirements.	Created status reporting training and trained over 130 customers.
EPMO Newsletter	Produced two quarterly newsletters to provide agencies with key EPMO information and guidance.
Quarterly releases for changes.	Implemented quarterly release program for changes. Enable agencies to better understand the improvements and easier to reference changes in processes, documentation or the PPM tool.
Communicated and clarified "What is an IT project?"	Provided communication to help agencies better understand "What is an IT project?"
PMAG and Methodology Group meetings.	Well attended by representation from several agencies. Extensive sharing of information with Enterprise PM community.
Communicated and clarified the state approver role.	There has been communication on the role of the PMA and state approvers. These roles have been clarified.

2. Improve Project Management Knowledge Sharing

Overview	Expand opportunities for agencies to share project management best practices, templates, project information, documentation and lessons learned.
Benefits	• Consistent approach to project management. • Improve quality of information with standardized and "best in class" templates. • Improve agency project managers' knowledge and skills through sharing of project management, application and infrastructure knowledge across agencies.

08-09 Action Plan	
EPMO web site to include best practices templates, indexed and organized. (Jesus, Barbara)	Work with agencies to gather their templates and organize all templates into a web site where the information is very easy to find.
Look into using "eRoom" to allow project managers to share knowledge and questions across the state agencies. (Jesus, Barbara)	"eRoom" would allow agency PM's to ask questions and for the EPMO or any agency PM respond or share information. Questions including best practices, templates, sharing similar project plans and project knowledge would be available for review by all agencies.
Work with the agency PMOs to see what project management areas need to be enhanced and improved. (Kathy, Gaye)	Meet with agency PMO leadership quarterly to discuss continuous improvement areas for the EPMO and the agency PMO.
Identify two highly successful projects and document the areas that made the projects successful. (PMAs)	PMAs work with agency PM to document and communicate these successes.
Determine how to better leverage project lessons learned. (Alisa, Charles, Jim)	Develop and implement a plan to use lesson learned information to improve the success of future projects.

07-08 Accomplishments	
Quarterly meetings with PMO leaders.	Held three meetings to discuss PMO issues.
Quarterly releases	In March and June a quarterly release of processes and tool changes were communicated and implemented.
Project Management Advisory Group	Monthly meeting to share and exchange project management information.
Methodology Group	Methodology group developed key processes such as gate approval checklist, program management guidelines, and RACI improvements.

3. Coordinate Training to Improve and Grow Project Manager Skills

Overview	Provide agency staff with opportunities for cost effective training in all aspects of the Project Manager role.
Benefits	• Increase success in managing projects, contracts, and vendors. • Increase number of state project managers earning Project Management Professional certification. • Aid employees career development by improving project management and business skills.

08-09 Action Plan	
Coordinate training for agencies. (Barbara)	Coordinate training for classes in Estimating, Requirements Gathering, RFP Development and Business Analysis.
Provide PMP Exam Prep classes. (Linda, Jesus)	In the Spring and Fall, EPMO will continue to offer a class to prepare state project managers for the Project Management Institute's (PMI) certification exam.
Better leverage the PMO Executive Council membership. (Bob, Kathy)	Participate in appropriate research activities. Track findings of benefits realization research and develop plan for practical application within State enterprise.
Provide training in different areas of project management based on analysis of the project success and EPMO value driver metrics. (Barbara based on EPMO metric data)	Based on data from metrics and lessons learned.

07-08 Accomplishments	
Provided training opportunities for the agencies.	Coordinated Requirements Gathering, RFP Boot Camp, SQA load testing and Business Analyst Boot Camp classes attended by 81 agency staff.
Offered PMP certification exam prep classes.	Coordinated and taught PMP certification exam prep classes in Fall 2007 and Spring 2008.
Created informal educational and networking opportunities for project managers.	Supported monthly PMAG and PMI LIG meetings to provide speakers and information sharing opportunities for agency staff.
Distributed meeting schedules for PMO Executive Council sessions.	Free teleconferences on a variety of relevant project management topics. Attendance at council meetings and leadership conferences.

4. Implement Two EPMO Processes that Provide Value to Agencies

Overview	Based on the EPMO survey of 2007, business leaders (non-IT) need a better understanding of business case development. Review the agency IT Business Plan to better understand agency business and to explore if strategic initiatives can be aligned to the statewide project approval process.
Benefits	• Business leaders can make better decisions on business programs requiring technology. • EPMO and agencies become proactive about project management instead of reactive. • PMAs improve understanding of their agencies.

08-09 Action Plan	
Work with agencies on what is needed for business leaders understanding of business cases. (Kathy, Tom Runkle and Jim Dolan)	Work with Tom Runkle and Jim Dolan to grow business leader knowledge on the alignment between business needs and the cost of technology.
Review agency IT Business Plans and explore if these initiatives can fit into statewide project approval requirements. (PMAs and Kathy)	PMAs review 08-09 IT Business Plans and work with Tom Runkle and agencies to determine what initiatives are projects and how to provide the support and guidance for this work.

5. Review Tools and Processes to Help Improve Project Quality and Reduce Project Risk

Overview	Evaluate and improve tools and processes to provide agencies appropriate information to manage projects and applications.
Benefits	• CIOs have timely information to identify and manage high risk projects and applications. • Project managers use consistent processes and timely data to manage project scope, schedule, budget and risk. • Less customer frustration on trying to force fit a project into the PPM tool • Right sizing project requirements can result in focusing scarce resource time on critical and high risk projects. • Better utilization of resources and IT spending.

08-09 Action Plan	
Review PPM workflow and documentation requirements. (Jim, Linda)	Step back and look at PPM workflow process and requirements to see the following; 1) Is the documentation being reviewed and providing value? 2) Are the right people reviewing project documentation? 3) Is the content and detailed level of documentation appropriate for determining project success? 4) Can the workflow be improved?
Revisit tool strategy (Jim)	Review tools for possible future replacement.
Create a process for projects with non-typical project life cycles. (Barbara)	Provide clear, consistent direction for projects that do not fit the standard life cycle of a project.
Portfolio Management (Jim)	Provide agencies and reviewers with reports on high risk projects. Include these projects in quarterly SCIO reviews. Work with agencies and OSBM on application investments to get funding for aging technology.

07-08 Accomplishments	
Published Program Process	Provided agencies a clear, concise process to manage programs in the PPM tool.
Published Updated Change Request Process	Worked with OSBM to update and clarify the rules around change requests.
Published Workflow Checklists	Methodology Group created checklists to aid project managers in preparing for Gate Approval.
Created Workflow Diagram for Registered Projects	Documented the process and requirements for approving projects with a total investment cost between 100K and 499K.
Published non-approval process	Published and put into effect for projects that are implemented without the approval of the state approvers.
Updated RACI charts	Updated Responsible, Accountable, Informed and Consulted chart.
Update roles/responsibility matrix	Updated the roles/responsibility matrix for the PPM tool usage.

6. Develop or Improve upon Metrics that Effectively Measure Project Success and EPMO Effectiveness

Overview	Evaluate, enhance or create new EPMO value drivers and project success indicators that provide measurements which can be used to indicate trends on EPMO maturity progression and project health.
Benefits	• Provide method to consistently improve project successes. • Ability to focus on status of critical project success factors.

08-09 Action Plan	
Review EPMO value drivers in Project Management. (Bob, Dick)	Work with team and agencies to determine what value drivers are most important. Set targets and measure value drivers.
Determine or improve upon metrics for project scope, schedule and cost. (Bob, Dick)	Review or improve project indicators (jelly beans) to determine if they appropriately measure project health.
Benchmark EPMO organization maturity. (Jesus, Kathy)	Review current EPMO maturity and determine what steps to take to progress in maturity.
Determine change request metrics. (Bob, Dick)	
Explore the use of benefit realization measurements. (Bob, Jim Dolan)	

07-08 Accomplishments	
Published metrics on PMP certifications.	Quarterly
Published metrics on threshold indicators.	Quarterly

7. Coordinate the Effort to Improve and Align Project Approval and Procurement Processes

Overview	Bring the EPMO, statewide approvers, legal and agencies together to better understand and resolve issues with project approvals, RFPs and contract processes.
Benefits	• RFPs containing accurate, well defined requirements. • Reduction in resource time due to less rework. • Less customer frustration due to misunderstanding of RFP and project approval requirements.

08-09 Action Plan	
Coordinate Business Requirements and RFP training for agencies. (Barbara)	Coordinate RFP training classes for agency personnel.
Review and improve the RFP development process. (Alisa)	Work with EPMO, Procurement, Legal, Enterprise Architecture and agencies to analyze and improve RFP and BAFO processes.
Identify where the project approval process aligns with the procurement plan. (Alisa)	Eliminate confusion on the gate approval process and how it links to the procurement process.
For ITS Enterprise offerings, determine how the ITS service can be fast tracked through project approval and procurement process. (Alisa)	Eliminate confusion on what is required when a project or procurement will use standard ITS services.

07-08 Accomplishments	
RFP Training Course	Coordinated training class for RFP development.
Business Requirements training	Coordinated training to improve documentation of business requirements on RFPs.